

# UNITED STATES HOUSE OF REPRESENTATIVES 2018 FINANCIAL DISCLOSURE STATEMENT

Form A  
For Use by Members, Officers, and Employees

**HAND  
DELIVERED** 1 of 3

LEGISLATIVE RESOURCE CENTER

2019 JUN 19 AM 8:29 AM  
(Office Use Only)

MC

Name: Fred Updegraff Daytime Telephone: 202-225-3761

A \$200 penalty shall be assessed against any individual who files more than 30 days late.

FILER STATUS	<input checked="" type="checkbox"/> Member of the U.S. House of Representatives	State: <u>MI</u> District: <u>6</u>	<input type="checkbox"/> Officer or Employee	Employing Office: _____	Staff Filer Type: (If Applicable) <input type="checkbox"/> Shared <input type="checkbox"/> Principal Assistant
REPORT TYPE	<input checked="" type="checkbox"/> 2018 Annual (Due: May 15, 2019)	<input type="checkbox"/> Amendment	<input type="checkbox"/> Termination	Date of Termination: _____	

## PRELIMINARY INFORMATION - ANSWER EACH OF THESE QUESTIONS

*As to the Trusts of which I have no control did so - I have no ownership in most of them.*

A. Did you, your spouse, or your dependent child: a. Own any reportable asset that was worth more than \$1,000 at the end of the reporting period? or b. Receive more than \$200 in unearned income from any reportable asset during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	F. Did you have any reportable agreement or arrangement with an outside entity during the reporting period or in the current calendar year up through the date of filing?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
B. Did you, your spouse, or your dependent child purchase, sell, or exchange any securities or reportable real estate in a transaction exceeding \$1,000 during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	G. Did you, your spouse, or your dependent child receive any reportable gift(s) totaling more than \$390 in value from a single source during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
C. Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	H. Did you, your spouse, or your dependent child receive any reportable travel or reimbursements for travel totaling more than \$390 in value from a single source during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	I. Did any individual or organization make a donation to charity in lieu of paying you for a speech, appearance, or article during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
E. Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER "YES"	

## IPO AND EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION - ANSWER EACH OF THESE QUESTIONS

IPO - Did you purchase any shares that were allocated as a part of an Initial Public Offering during the reporting period? If you answered "yes" to this question, please contact the Committee on Ethics for further guidance.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
TRUSTS - Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust that benefits you, your spouse, or dependent child?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
EXEMPTION - Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or your dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

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**Use additional sheets if more space is required.**

# SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name:

*Upston*

Page

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BLOCK A Assets and/or Income Sources		BLOCK B Value of Asset													BLOCK C Type of Income							BLOCK D Amount of Income												BLOCK E Transaction					
SP, DC, JT	ASSET NAME	EIF	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX-DEFERRED	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	P, S, S(part), or E			
	None																																						
	\$1-\$1,000																																						
	\$1,001-\$15,000																																						
	\$15,001-\$50,000																																						
	\$50,001-\$100,000																																						
	\$100,001-\$250,000																																						
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	\$5,000,001-\$25,000,000																																						
	\$25,000,001-\$50,000,000																																						
	Over \$50,000,000																																						
	Spouse/DC Asset over \$1,000,000*																																						
	ST Starbucks																																						
	ST Under Armour LLC																																						
	ST Under Armour LLC																																						
	ST XPO Logistics																																						
	Yum Brands																																						
	Yum China Holdings																																						
	Columbia TriStar																																						
	Hartford Financial Services																																						
	MFS Mutual Fund																																						
	Chesapeake Energy																																						
	JP Morgan JPM																																						
	ST Stylen																																						
	SP AT&T																																						
	SP Altria Group																																						
	SP BP PLC																																						
	SP British Airways																																						

# SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name:

*Lepton*

Page

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BLOCK A Assets and/or Income Sources		BLOCK B Value of Asset													BLOCK C Type of Income							BLOCK D Amount of Income												BLOCK E Transaction	
SP, DC, JT	ASSET NAME	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX-DEFERRED	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	P, S, S(part), or E
	None																																		
	\$1-\$1,000																																		
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	Over \$50,000,000																																		
	Spouse/DC Asset over \$1,000,000*																																		
SP	Comcast C/A			X											X																				
SP	DeaDeport			X											X																				
SP	Exxon Mobil						X								X																				
SP	Future Brands														X																				
SP	G.E.														X																				
SP	IBM														X																				
SP	Pfizer						X								X																				
SP	Philip Morris														X																				
SP	Post Holdings														X																				
SP	Raytheon														X																				
SP	Synovus Financial														X																				
SP	21st Century Fox C/A														X																				
SP	Verizon														X																				
SP	WikiLeak														X																				
SP	Zoetis C/A														X																				
SP	Longard Tabor Fd 100%														X																				

# SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name:

*Upder*

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BLOCK A Assets and/or Income Sources		BLOCK B Value of Asset													BLOCK C Type of Income							BLOCK D Amount of Income												BLOCK E Transaction		
SP, DC, JT	ASSET NAME	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX-DEFERRED	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	P, S, S(part), or E	
	None																																			
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	\$5,000,001-\$25,000,000																																			
	\$25,000,001-\$50,000,000																																			
	Over \$50,000,000																																			
	Spouse/DC Asset over \$1,000,000*																																			
	Hartford Life Ins																																			
	NY Life Ins																																			
	SP National Life Ins																																			
	Mass Mutual Life Ins																																			
	SP Retirement Club/Equity																																			

## Page 6 of 31

BLOCK A		BLOCK B													BLOCK C								BLOCK D												BLOCK E			
Assets and/or Income Sources		Value of Asset													Type of Income								Amount of Income												Transaction			
SP, DC, JT	ASSET NAME	EIF	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX-DEFERRED	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	J	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	P, S, S(part), or E		
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	Total value to compared a P:																																					
	With spouse																																					
	SP Morgan Assets																																					
	Fidelity Investments																																					
	Emergency mkt's																																					
	Wells Fargo																																					
	Northern Trust																																					
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Page ~~7~~ of 3

**Use additional sheets if more space is required.**

Name: Winton

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**Use additional sheets if more space is required.**



# SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name:

*Captn*

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BLOCK A Assets and/or Income Sources		BLOCK B Value of Asset													BLOCK C Type of Income							BLOCK D Amount of Income												BLOCK E Transaction		
SP, DC, JT	ASSET NAME	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX-DEFERRED	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	P, S, S(part), or E	
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Name: upton

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BLOCK A		BLOCK B													BLOCK C							BLOCK D												BLOCK E				
Assets and/or Income Sources		Value of Asset													Type of Income							Amount of Income												Transaction				
SF, DC, JT	ASSET NAME	EIF	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX-DEFERRED	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	P, S, S(part), or E		
			None																					None														
			\$1-\$1,000																					\$1-\$200														
			\$1,001-\$15,000																					\$201-\$1,000														
			\$15,001-\$50,000																					\$1,001-\$2,500														
			\$50,001-\$100,000																					\$2,501-\$5,000														
			\$100,001-\$250,000																					\$5,001-\$15,000														
			\$250,001-\$500,000																					\$15,001-\$50,000														
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			\$1,000,001-\$5,000,000																					\$100,001-\$1,000,000														
			\$5,000,001-\$25,000,000																					\$1,000,001-\$5,000,000														
			\$25,000,001-\$50,000,000																					Over \$5,000,000														
			Over \$50,000,000																					Spouse/DC Asset with income over \$1,000,000*														
			Spouse/DC Asset over \$1,000,000*																																			
			NONE																																			
			DIVIDENDS																																			
			RENT																																			
			INTEREST																																			
			CAPITAL GAINS																																			
			EXCEPTED/BLIND TRUST																																			
			TAX-DEFERRED																																			
			Other Type of Income (Specify: e.g., Partnership Income or Farm Income)																																			

# SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name:

*Walter*

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BLOCK A Assets and/or Income Sources		BLOCK B Value of Asset													BLOCK C Type of Income							BLOCK D Amount of Income												BLOCK E Transaction			
SP, DC, JT	ASSET NAME	EF	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX-DEFERRED	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	P, S, S(part), or E	
			None	\$1-\$1,000	\$1,001-\$15,000	\$15,001-\$50,000	\$50,001-\$100,000	\$100,001-\$250,000	\$250,001-\$500,000	\$500,001-\$1,000,000	\$1,000,001-\$5,000,000	\$5,000,001-\$25,000,000	\$25,000,001-\$50,000,000	Over \$50,000,000	Spouse/DC Asset over \$1,000,000*									None	\$1-\$200	\$201-\$1,000	\$1,001-\$2,500	\$2,501-\$5,000	\$5,001-\$15,000	\$15,001-\$50,000	\$50,001-\$100,000	\$100,001-\$1,000,000	\$1,000,001-\$5,000,000	Over \$5,000,000	Spouse/DC Asset with Income over \$1,000,000*		
	<i>Vanguard Ind. Inv. Fdn</i>							X																													
	<i>Vanguard Real Estate ETF</i>						X																														
	<i>Pine Hill</i>				X																																
	<i>Franklin Templeton</i>				X																																
	<i>Northern Short-Term</i>				X																																
	<i>Vanguard Div. Intl. Bond</i>						X																														
	<i>Fidelity TIPS</i>						X																														

# SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name: Upston

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BLOCK A Assets and/or Income Sources		BLOCK B Value of Asset													BLOCK C Type of Income							BLOCK D Amount of Income												BLOCK E Transaction		
SP, DC, JT	ASSET NAME	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX-DEFERRED	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	P, S, S(part), or E	
	<i>J.P. Morgan managed trusts controlled by w/o I have in me. I own trusts. No ownership.</i>																																			
	<i>Total value:</i>																																			
	<i>composed of:</i>																																			
	<i>Widowpool - WHR</i>																																			
	<i>SPDR S&amp;P 500 - SPY</i>																																			
	<i>SPM GLBES ID JELM</i>																																			
	<i>Ishares Index EFA</i>																																			
	<i>Dodge &amp; Cox Stock DODX</i>																																			
	<i>APOL Pacific ABZK</i>																																			
	<i>Dodge &amp; Cox Income DODI</i>																																			
	<i>SPM Equity TUEHX</i>																																			
	<i>ESons IETX</i>																																			
	<i>MFS Int. MINTX</i>																																			
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Use additional sheets if more space is required.

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Use additional sheets if more space is required

# SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name:

*Caplan*

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BLOCK A Assets and/or Income Sources		BLOCK B Value of Asset													BLOCK C Type of Income							BLOCK D Amount of Income												BLOCK E Transaction	
SP, DC, JT	ASSET NAME	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX-DEFERRED	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	P, S, S(part), or E
	<i>None</i>																																		
	<i>Massachusetts</i>																																		<i>S</i>
	<i>Allegany</i>																																		<i>S</i>
	<i>Carroll C/A</i>																																		<i>S</i>
	<i>Linda</i>																																		<i>S</i>
	<i>Phizer</i>																																		<i>S</i>
	<i>Bank of America</i>																																		<i>S</i>
	<i>Calgene</i>																																		<i>S</i>
	<i>Broadcom</i>																																		<i>S</i>
	<i>Disney</i>																																		<i>S</i>
	<i>Northville Southern</i>																																		<i>S</i>
	<i>Lyman Pacific</i>																																		<i>S</i>
	<i>Morgan Stanley</i>																																		<i>S</i>
	<i>Pepsi</i>																																		<i>S</i>
	<i>Bedfordshire Valley</i>																																		<i>S</i>
	<i>Texas Trust</i>																																		<i>S</i>
	<i>Bayne Report</i>																																		<i>S</i>

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Use additional sheets if more space is required.



# SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name:

*Updon*

Page

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BLOCK A Assets and/or Income Sources		BLOCK B Value of Asset													BLOCK C Type of Income							BLOCK D Amount of Income												BLOCK E Transaction		
SP, DC, JT	ASSET NAME	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX-DEFERRED	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	P, S, S(part), or E	
	<i>None</i>																																			
	<i>American Express</i>			X																																<i>S</i>
	<i>Davidson</i>			X																																<i>S</i>
	<i>Trust</i>			X																																<i>S</i>
	<i>Visa cc</i>			X																																
	<i>Use c/c</i>			X																																
	<i>Fidelity Ast</i>			X																																
	<i>Mercury</i>			X																																
	<i>FISERV</i>			X																																
	<i>Electronic Arts</i>			X																																<i>P</i>
	<i>Powers Ast. Res</i>			X																																<i>P</i>
	<i>Philip Morris</i>			X																																<i>S</i>
	<i>Shady Ridge &amp; Beck</i>			X																																<i>P</i>
	<i>Art Pix</i>			X																																<i>P</i>
	<i>General Dynamics</i>			X																																<i>P</i>
	<i>Loews</i>			X																																<i>P</i>
	<i>Autobank Bk</i>			X																																

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Use additional sheets if more space is required.

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Use additional sheets if more space is required.

# SCHEDULE B - TRANSACTIONS

Name:

*W. J. J.*

Page

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Report any purchase, sale, or exchange transactions that exceeded \$1,000 in the reporting period of any security or real property held by you, your spouse, or your dependent child for investment or the production of income. Include transactions that resulted in a capital loss. Provide a brief description of an exchange transaction. Exclude transactions between you, your spouse, or dependent children, or the purchase or sale of your personal residence, unless it generated rental income. If only a portion of an asset is sold, please choose "partial sale" as the type of transaction.

Capital Gains: If a sales transaction resulted in a capital gain in excess of \$200, check the capital gains box, unless it was an asset in a tax-deferred account, and disclose the capital gain income on Schedule A.

\* Column K is for assets solely held by your spouse or dependent child.

SP, DC, JT	Asset																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																											</
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# SCHEDULE B - TRANSACTIONS

Name: Caplan

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Report any purchase, sale, or exchange transactions that exceeded \$1,000 in the reporting period for any security or real property held by you, your spouse, or your dependent child for investment or the production of income. Include transactions that resulted in a capital loss. Provide a brief description of an exchange transaction. Exclude transactions between you, your spouse, or dependent children, or the purchase or sale of your personal residence, unless it generated rental income. If only a portion of an asset is sold, please choose "partial sale" as the type of transaction.			Type of Transaction				Date (INDICATE) or Quarterly, Monthly, or Bi- weekly, if applicable	Amount of Transaction										
SP, DC, JT	Asset	SP	Purchase	Sale	Partial Sale	Exchange	Check Box if Capital Gain Exceeded \$200	A \$1,001- \$15,000	B \$15,001- \$50,000	C \$50,001- \$100,000	D \$100,001- \$250,000	E \$250,001- \$500,000	F \$500,001- \$1,000,000	G \$1,000,001- \$5,000,000	H \$5,000,001- \$25,000,000	I \$25,000,001- \$50,000,000	J Over \$50,000,000	K Over \$1,000,000* (Spouse/DC Asset)
	These transactions done by T.P. Morgan in funds w/o capital by me																	
	wh.v.pool			X				11/15/18		X								
	wh.v.pool			X				2/28/18		X								
	wh.v.pool			X				7/8/18		X								
	wh.v.pool			X				4/6/18		X								
	wh.v.pool			X				11/2/18		X								
	wh.v.pool			X				5/2/18		X								
	wh.v.pool			X				6/6/18		X								
	wh.v.pool			X				7/2/18		X								
	wh.v.pool			X				8/8/18		X								
	ESAT			X				7-24/18		X								
	Amazon			X				11/15/18		X								
	Philip Morris			X				11/24/18		X								
	Exelstar Hefway			X				11/13/18		X								
	wh.v.pool			X				11/2/18		X								

# SCHEDULE B - TRANSACTIONS

Name: Upstew

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Report any purchase, sale, or exchange transactions that exceeded \$1,000 in the reporting period of any security or real property held by you, your spouse, or your dependent child for investment or the production of income. Include transactions that resulted in a capital loss. Provide a brief description of an exchange transaction. Exclude transactions between you, your spouse, or dependent children, or the purchase or sale of your personal residence, unless it generated rental income. If only a portion of an asset is sold, please choose "partial sale" as the type of transaction.

Capital Gains: If a sales transaction resulted in a capital gain in excess of \$200, check the "capital gains" box, unless it was an asset in a tax-deferred account, and disclose the capital gain income on Schedule A.

\* Column K is for assets solely held by your spouse or dependent child.

SP, DC, JT	SP	Example	Asset	Type of Transaction				Check Box if Capital Gain Exceeded \$200	Date (MONTH/YR) or Quarterly, Monthly, or Bi- weekly, if applicable	Amount of Transaction										
				Purchase	Sale	Partial Sale	Exchange			A \$1,001- \$15,000	B \$15,001- \$50,000	C \$50,001- \$100,000	D \$100,001- \$250,000	E \$250,001- \$500,000	F \$500,001- \$1,000,000	G \$1,000,001- \$5,000,000	H \$5,000,001- \$25,000,000	I \$25,000,001- \$50,000,000	J Over \$50,000,000	K Over \$1,000,000* (Spouse/DC Asset)
			SPM / # contrib / # ownership			X		X	3/9/13		X									
			ITX Co.		X				1-11-18	X										
			21st Cent Fox - CCA	X					1-11-18	X										
			Unid Confirmt		X				1-11-18	X										
			Verity Pharm	X					1-11-18	X										
			West Conneho's	X					1-11-18	X										
			Zimmer Holdings	X					1-11-18	X										
			Wells Fargo		X				1-11-18	X										
			Workday Inc CCA	X					1-11-18	X										
			Celgene	X					1-11-18	X										
			Meredith	X					7-26-18	X										
			21st Cent Fox - CCA		X				9-24-18	X										
			Verity	X					9-12-18	X										
			Facebook		X				9-12-18	X										
			Annie's Bureau	X					9-12-18	X										
			Rockstar Technology	X					8-13-18	X										
			American Ent		X				9-13-18	X										
			Wh.../pool		X				9-12-18		X									

# SCHEDULE B - TRANSACTIONS

Name:

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Report any purchase, sale, or exchange transactions that exceeded \$1,000 in the reporting period of any security or real property held by you, your spouse, or your dependent child for investment or the production of income. Include transactions that resulted in a capital loss. Provide a brief description of an exchange transaction. Exclude transactions between you, your spouse, or dependent children, or the purchase or sale of your personal residence, unless it generated rental income. If only a portion of an asset is sold, please choose "partial sale" as the type of transaction.

Capital Gains: If a sales transaction resulted in a capital gain in excess of \$200, check the "capital gains" box, unless it was an asset in a tax-deferred account, and disclose the capital gain income on Schedule A.

\* Column K is for assets solely held by your spouse or dependent child.

SP, DC, JT	Asset	Type of Transaction				Check Box if Capital Gain Exceeded \$200	Date (MO/DA/YR) or Quarterly, Monthly, or Bi- weekly, if applicable	Amount of Transaction										
		Purchase	Sale	Partial Sale	Exchange			A \$1,001- \$15,000	B \$15,001- \$50,000	C \$50,001- \$100,000	D \$100,001- \$250,000	E \$250,001- \$500,000	F \$500,001- \$1,000,000	G \$1,000,001- \$5,000,000	H \$5,000,001- \$25,000,000	I \$25,000,001- \$50,000,000	J Over \$50,000,000	K Over \$1,000,000* (Spouse/DC Asset)
SP	Example Mega Corp. Stock			X		X	3/9/18		X									
	<i>IBM / # control / # ownership</i>																	
	<i>Gifted Server</i>	X					1-11-18	X										
	<i>Hemynell</i>		X				1-11-18	X										
	<i>IBM</i>	X					1-11-18	X										
	<i>Keycorp</i>	X					1-11-18	X										
	<i>ATI Lilly</i>	X					1-11-18	X										
	<i>Mastercard C/A</i>		X				1-11-18	X										
	<i>Merck</i>	X					1-11-18	X										
	<i>Microsoft</i>		X				1-11-18	X										
	<i>Procter &amp; Gamble</i>		X				1-11-18	X										
	<i>VeriFone Software</i>	X					1-11-18	X										
	<i>Neelburg Insurance</i>		X				1-11-18	X										
	<i>NVDA</i>	X					1-11-18	X										
	<i>Parker Hannifin</i>	X					1-11-18	X										
	<i>Pepsi</i>	X					1-11-18	X										
	<i>Pfizer</i>		X				1-11-18	X										
	<i>Philip Morris</i>	X					1-11-18	X										
	<i>Stanley Black &amp; Decker</i>		X				1-11-18	X										

# SCHEDULE B - TRANSACTIONS

Name:

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SP, DC, JT		Asset	Type of Transaction				Date	Amount of Transaction											
SP	DC	JT	Purchase	Sale	Partial Sale	Exchange	(Indicate if Capital Gain Exceeded \$200)	A \$1,001- \$15,000	B \$15,001- \$50,000	C \$50,001- \$100,000	D \$100,001- \$250,000	E \$250,001- \$500,000	F \$500,001- \$1,000,000	G \$1,000,001- \$5,000,000	H \$5,000,001- \$25,000,000	I \$25,000,001- \$50,000,000	J Over \$50,000,000	K Over \$1,000,000* (Spouse/DC Asset)	
		Example Mega Corp. Stock			X		X	3/9/18		X									
		SPM / Joint Control / Joint Ownership																	
		Analog Devices		X				1-11-18	X										
		Apple		X				1-11-18	X										
		Bank of America	X					1-11-18	X										
		Blackrock Inc		X				1-11-18	X										
		Boston Scientific	X					1-11-18	X										
		Bush / Myers Smith		X				1-11-18	X										
		CMS Energy		X				1-11-18	X										
		Capitol One Fin	X					1-11-18	X										
		Citigroup	X					1-11-18	X										
		Comcast Corp		X				1-11-18	X										
		Delta Airlines	X					1-11-18	X										
		Allegion	X					1-11-18	X										
		Dick Corporation	X					1-11-18	X										
		Micron Tech	X					1-11-18	X										
		LeBlanc Sacks	X					1-11-18	X										
		Dowdyman		X				1-11-18	X										
		EOC Resources		X				1-11-18	X										



# SCHEDULE B - TRANSACTIONS

Name:

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Report any purchase, sale, or exchange transactions that exceeded \$1,000 in the reporting period of any security or real property held by you, your spouse, or your dependent child for investment or the production of income. Include transactions that resulted in a capital loss. Provide a brief description of an exchange transaction. Exclude transactions between you, your spouse, or dependent children, or the purchase or sale of your personal residence, unless it generated rental income. If only a portion of an asset is sold, please choose "partial sale" as the type of transaction.		Type of Transaction				Date		Amount of Transaction										
SP, DC, JT	Asset	Purchase	Sale	Partial Sale	Exchange	Check Box If Capital Gain Exceeded \$200	(MOD/VOL) or Quantity, Month, or Bi-weekly, if applicable	A \$1,001-\$15,000	B \$15,001-\$50,000	C \$50,001-\$100,000	D \$100,001-\$250,000	E \$250,001-\$500,000	F \$500,001-\$1,000,000	G \$1,000,001-\$5,000,000	H \$5,000,001-\$25,000,000	I \$25,000,001-\$50,000,000	J Over \$50,000,000	K Over \$1,000,000* (Spouse/DC Asset)
SP	Example Mega Corp. Stock			X		X	3/31/18		X									
	<i>TPM/No control/forever</i>																	
	<i>Coca Cola</i>	X					4/13-18	X										
	<i>Abbott Labs</i>		X				4-6-18	X										
	<i>IBM</i>			X			3-9-18	X										
	<i>Oracle</i>	X					3-9-18	X										
	<i>Oracle</i>	X					2-22-18	X										
	<i>Cigna</i>		X				2-22-18	X										
	<i>SVB Financial</i>	X					1-31-18	X										
	<i>TX Co</i>		X				1-26-18	X										
	<i>Pepsi</i>	X					1-30-18	X										
	<i>Apple</i>		X				1-26-18	X										
	<i>Acer/lenovo</i>	X					1-11-18	X										
	<i>Broadcom</i>		X				1-11-18	X										
	<i>Abbott Labs</i>	X					1-11-18	X										
	<i>Adobe Systems</i>	X					1-11-18	X										
	<i>Avaya Tech.</i>	X					1-11-18	X										
	<i>Alphabet LLC</i>		X				1-11-18	X										
	<i>Amazon</i>	X					1-11-18	X										

# SCHEDULE B - TRANSACTIONS

Name: W. Johnson

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Report any purchase, sale, or exchange transactions that exceeded \$1,000 in the reporting period of any security or real property held by you, your spouse, or your dependent child for investment or the production of income. Include transactions that resulted in a capital loss. Provide a brief description of an exchange transaction. Exclude transactions between you, your spouse, or dependent child, or the purchase or sale of your personal residence, unless it generated rental income. If only a portion of an asset is sold, please choose "partial sale" as the type of transaction.

Capital Gains: If a sales transaction resulted in a capital gain in excess of \$200, check the "capital gains" box, unless it was an asset in a tax-deferred account, and disclose the capital gain income on Schedule A.

\* Column K is for assets solely held by your spouse or dependent child.

SP, DC, JT	Asset	Type of Transaction				Check Box if Capital Gain Exceeded \$200	Date (MM/DD/YY) or Quarterly, Monthly, or Bi- weekly, if applicable	Amount of Transaction										
		Purchase	Sale	Partial Sale	Exchange			A \$1,001- \$15,000	B \$15,001- \$50,000	C \$50,001- \$100,000	D \$100,001- \$250,000	E \$250,001- \$500,000	F \$500,001- \$1,000,000	G \$1,000,001- \$5,000,000	H \$5,000,001- \$25,000,000	I \$25,000,001- \$50,000,000	J Over \$50,000,000	K Over \$1,000,000* (Spouse/DC Asset)
Example	Mega Corp. Stock			X		X	3/31/13		X									
	TPM / Control / Economy		X				9/18/15		X									
	Whirlpool		X				9/12/14		X									
	Noike		X				8/27/15	X										
	ESLc Louder	X					8/27/15	X										
	Noike		X				8/27/15	X										
	Whirlpool		X				8/14/15		X									
	Whirlpool		X				3/14/16		X									
	Whirlpool		X				10/3/15		X									
	Electric Home Airs	X					9/24/15	X										
	21st Cent Fox		X				7/24/15	X										
	NetPiv	X					9/12/15	X										
	Factbook		X				9/17/15	X										
	Microchip Tech		X				9/17/15	X										
	Amalgam Devis	X					9/14/15	X										
	Bethlin Highway	X					9/13/15	X										
	Esco L	X					8/27/15	X										
	American End		X				9/13/15	X										
	21st Cent Fox		X				8/13/15	X										

# SCHEDULE B - TRANSACTIONS

JP Morgan Bank

Name:

Lepton

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Report any purchase, sale, or exchange transactions that exceeded \$1,000 in the reporting period of any security or real property held by you, your spouse, or your dependent child for investment or the production of income. Include transactions that resulted in a capital loss. Provide a brief description of an exchange transaction. Exclude transactions between you, your spouse, or dependent children, or the purchase or sale of your personal residence, unless it generated rental income. If only a portion of an asset is sold, please choose "partial sale" as the type of transaction.

Capital Gains: If a sales transaction resulted in a capital gain in excess of \$200, check the "capital gains" box, unless it was an asset in a tax-deferred account, and disclose the capital gain income on Schedule A.

\* Column K is for assets solely held by your spouse or dependent child.

SP, DC, JT	Asset	Purchase	Sale	Partial Sale	Exchange	Check Box if Capital Gain Exceeded \$200	Date (MO/DAY/YR) or Quarterly, Monthly, or Bi- weekly, if applicable	A \$1,001- \$15,000	B \$15,001- \$50,000	C \$50,001- \$100,000	D \$100,001- \$250,000	E \$250,001- \$500,000	F \$500,001- \$1,000,000	G \$1,000,001- \$5,000,000	H \$5,000,001- \$25,000,000	I \$25,000,001- \$50,000,000	J Over \$50,000,000	K Over \$1,000,000* (Spouse/DC Asset)
SP	Example Mega Corp. Stock			X		X	3/2/18		X									
	Massachusetts Attorney		X				11/3/18	X										
	Sherry Clarke		X				10/10/18	X										
	Leather Bank of NY/Indo		X				10/10/18	X										
	SalesForce Com	X					10/10/18	X										
	NVIDEA	X					10/10/18	X										
	whur'pool		X				10/10/18	X										
	whur'pool		X				10/10/18	X										
	Goldman Sachs		X				10/10/18	X										
	Pendental Fin.	X					10/10/18	X										
	whur'pool		X				10/10/18	X										
	whur'pool		X				10/10/18	X										
	General Dynamics	X					10/10/18	X										
	Ross Shores	X					10/10/18	X										
	Linda	X					10/10/18	X										
	ISKE Bank		X				10/10/18	X										
	whur'pool		X				10/10/18	X										
	Anna-Richt	X					10/10/18	X										

# SCHEDULE B - TRANSACTIONS

Name:

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Report any purchase, sale, or exchange transactions that exceeded \$1,000 in the reporting period of any security or real property held by you, your spouse, or your dependent child for investment or the production of income. Include transactions that resulted in a capital loss. Provide a brief description of an exchange transaction. Exclude transactions between you, your spouse, or dependent children, or the purchase or sale of your personal residence, unless it generated rental income. If only a portion of an asset is sold, please choose "partial sale" as the type of transaction.

Capital Gains: If a sales transaction resulted in a capital gain in excess of \$200, check the "capital gains" box, unless it was an asset in a tax-deferred account, and disclose the capital gain income on Schedule A.

\* Column K is for assets solely held by your spouse or dependent child.

SP, DC, JT	Asset	Type of Transaction				Check Box if Capital Gain Exceeded \$200	Date (MONTH/RY) or Quarterly, Monthly, or Bi- weekly, if applicable	Amount of Transaction										
		Purchase	Sale	Partial Sale	Exchange			A \$1,001- \$15,000	B \$15,001- \$50,000	C \$50,001- \$100,000	D \$100,001- \$250,000	E \$250,001- \$500,000	F \$500,001- \$1,000,000	G \$1,000,001- \$5,000,000	H \$5,000,001- \$25,000,000	I \$25,000,001- \$50,000,000	J Over \$50,000,000	K Over \$1,000,000* (Spouse/DC Asset)
SP	Example Mega Corp. Stock			X		X	3/9/18		X									
	These transactions done by Northern Trust wife control by me																	
	CNO Financial		X				4/18/18	X										
	Boeing	X					4-18-18	X										
	Castro	X					4-18-18	X										
	Whirlpool		X				5-30-18	X										
	Carnival Corp	X					5-30-18	X										
	Boeing	X					5-30-18	X										
	Disney	X					5-30-18	X										
	General Dynamics	X					5-30-18	X										
	Henry Well	X					5-30-18	X										
	Microsoft	X					5-30-18	X										
	TIx	X					5-30-18	X										
	Neenah Paper		X				9/11/18	X										

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**INCOME LIMITS and PROHIBITED INCOME:** The 2018 limit on outside income earned for Members and employees compensated at or above the "senior staff" rate was \$28,050. The 2019 limit is \$28,440. In addition, certain types of income (notably honoraria, director's fees, and payments for professional services involving a fiduciary relationship) are totally prohibited.

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# SCHEDULE D - LIABILITIES

Name:

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Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or your dependent child. Mark the highest amount owed during the reporting period. Members are required to report all liabilities secured by real property including mortgages on their personal residence. Exclude: Any mortgage on your personal residence (unless you rent it out or are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities owed to you by a spouse or the child, parent, or sibling of you or your spouse. Report a revolving charge account (i.e., credit card) only if the balance at the close of the reporting period exceeded \$10,000. \*Column K is for liabilities held solely by your spouse or dependent child.

SP, DC, JT	Creditor	Date Liability Incurred MO/YR	Type of Liability	Amount of Liability										
				A \$10,001- \$15,000	B \$15,001- \$50,000	C \$50,001- \$100,000	D \$100,001- \$250,000	E \$250,001- \$500,000	F \$500,001- \$1,000,000	G \$1,000,001- \$5,000,000	H \$5,000,001- \$25,000,000	I \$25,000,001- \$50,000,000	J Over \$50,000,000	K Over \$1,000,000* (Spouse/DC Liability)
Example	First Bank of Wilmington, DE	5/16	Mortgage on Rental Property, Dover, DE				X							
JT	J.P. Morgan Chase	10/10	mortgage				X							

# SCHEDULE E - POSITIONS

Report all positions, compensated or uncompensated, held during the current or prior calendar year as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. Exclude: Positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organizations) and positions solely of an honorary nature.

Position	Name of Organization
Owner	Cyber Asset
owner w/ spouse	SEA Limited Partnership
Trustee	SEA Limited Partnership
Trustee	SEA LLC (Family partnership)
Trustee w/ spouse	SEA w/ Downs, BV LLC
Board member	SEA w/ Downs, BV LLC

**EXCLUDE:** Travel-related expenses provided by federal, state, and local governments, or by a foreign government required to be separately reported under the Foreign Gifts and Decorations Act (FGDA, 5 U.S.C. § 7342); political travel that is required to be reported under the Federal Election Campaign Act; travel provided to a spouse or dependent child that is totally independent of his or her relationship to the filer.

[illegible]